Date/Time Stamp:

## **Employee Post-Travel Disclosure of Travel Expenses**

SECRETARY OF THE SENATE

Post-Travel Filing Instructions: Complete this form within 30 days of returning from 17 SEP -5 PM 3: 55 travel. Submit all forms to the Office of Public Records in 232 Hart Building.

In compliance with Rube reimbursed/paid for			osures with respect to	travel expenses that have been or w
	•	rization (Form RE-1), grification Form with all		ry, invitee list, etc.)
Private Sponsor(s) (list	tall): The Aspen In	stitute		
Travel date(s): Augus	st 28 - 29, 2017	<u>.                                    </u>		
Name of accompanying Relationship to Travele	<u> </u>	ny): Child		
IF THE COST OF LODG INCLUDE LODGING Concepts for Employed	OSTS IN EMPLOYEE	EASE DUE TO THE ACC EXPENSES. (Attach addit	COMPANYING SPOU	ISE OR DEPENDENT CHILD, ONLY ry.)
	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
L Good Faith Estimate	\$753.10	\$134	\$103.50	\$173.14 (mtf room and incidentals)
Actual Amount	-			
Expenses for Accomp	anying Spouse or De	pendent Child (if applic	able):	
	Transportation Expenses	Lodging Expenses	Meal Expenses	Other Expenses (Amount & Description)
☐ Good Faith Estimate				
☐ Actual Amount				
Provide a description necessary.):  See atta	of all meetings and evached agenda	ents attended. See Senat	e Rule 35.2(c)(6). (A	Attach additional pages if
<del></del>		·	<u></u>	<u> </u>
9/5/17	Rebecca S	hipp		72
(Date)	(Printed r	name of traveler)		(Signature of traveler)
TO BE COMPLETED	BY SUPERVISING	MEMBER/OFFICER:		
I have made a determin	ation that the expense	es set out above in come tion, lodging, and related	ctions with travel de	scribed in the Employee Pre-Travel
	necessary transporta	non, rouging, and refates	expenses as depriled	HIII Kule 33.
1/5/17			How of	

(Signature of Supervising Senator/Officer)

Form RE-2

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(Date)

(Revised 1/3/11)

# Aspen Retreat for Senior Congressional Staff Network on Mobility from Poverty

## Mobility from Poverty: Recent Trends and Potential Responses

Hilton Cleveland Downtown 100 Lakeside Ave E Cleveland, OH 44114 P: 216-413-5000

August 28-29, 2017

### AGENDA

### **Retreat Goals:**

8:00 - 11:00 AM

Understand how economic mobility has changed over time and learn how neighborhood characteristics can influence economic mobility and intergenerational poverty.

Understand recent evidence on the effectiveness of interventions designed to increase mobility from poverty, including interventions that address the role of family, the role of place, and the changing structure of labor markets.

- Engage in active learning and build working relationships with scholars and practitioners in the field, with state and local officials, and with colleggues from different parties and chambers.
- Explore potential roles for Congress and Executive Branch agencies in increasing mobility from poverty.

Participants arrive and check in

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## Monday, August 28, 2017

11:30 – 12:00 PM	Welcome, Overview, and Retreat Objectives
12:00 – 1:00 PM	Lunch with Keynote Address on Economic Mobility
	This address will review the most recent evidence on changes over time in absolute and relative income mobility the effect of neighborhood characteristics on mobility from poverty, and potential policy responses to these trends.
1:00 - 1:15 PM	Break (1)
1:15 - 5:30 PM	Site Visit with Cleveland Service Providers
	Visit with Cleveland Public Schools and partner service providers to learn how schools are being used as a platform to provide more comprehensive services to help families increase mobility from poverty. Talk with residents about the challenges they face in achieving economic stability and helping their children succeed, and their experience engaging with service providers.
5:30 - 6:30 PM	Break
6:30 - 7:00 PM	Networking Reception with Expert Faculty
	Staffers will have the opportunity to network with participants during the reception.

7:00 ~	8:30	PM
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## Dinner with Discussion of Earlier Sessions

## Tuesday, August 29, 2017

7:30 - 8:30 PM	Breakfast
8:30 - 9:15 AM	Reflection on site visit
	Reflection on meetings with Cleveland residents and service providers. Discuss the extent to which challenges in Cleveland resemble challenges elsewhere in the country. Identify top two learning objectives for each participant.
9:15 - 10:30 AM	The Role of Family
	Learn about the effect of family formation on mobility from poverty and about programs designed to more effectively integrate supports for both children and parents.
10:30 - 10:45 AM	Break
10:45 – 12:00 PM	Responding to Changing Labor Markets
	Learn how changes in the labor market increase the challenge of mobility from poverty and consider potential policy responses, including better aligning education and sectorspecific job training, wage subsidies, and other responses.
12:00 – 12:15 PM	Break
12.15 - 1.30 PM	Lunch with Discussion of Place-Conscious Strategies
	Discuss the challenge of implementing collective impact models: how can successful, narrowly-focused programs be brought together into comprehensive strategies to address mobility on a neighborhood and regional-wide scale? What are the benefits and challenges of building mixed-income neighborhoods? How can regions build complementary strategies to improve existing neighborhoods while increasing geographic mobility for those who wish to move.
1:30 - 2:45 PM	Perspectives from State and Local officials
	Learn how city/county/state officials are thinking about issues related to mobility from poverty and how they view related federal policies.
2:45 - 3:00 PM	Break
3:00 - 3:15 PM	Complete program evaluation
3:15 - 3:45 PM	Final Observations from Expert Faculty
3:45 - 4:15 PM	Taking Stock: Staff Reflections and Feedback to Guide Next Steps for the Network
4:15 PM	Adjourn
5:00 – 7:00 PM	Participants depart for airport

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Date/Time Stamp:

## EMPLOYEE PRE-TRAVEL AUTHORIZATION

<u>Pre-Travel Filing Instructions</u>: Complete and submit this form at least 30 days prior to the travel departure date to the <u>Select Committee on Ethics</u> in <u>SH-220</u>. Incomplete and late travel submissions will <u>not</u> be considered or approved. This form <u>must</u> be typed and is available as a fillable PDF on the Committee's website at ethics.senate.gov. Retain a copy of your entire pre-travel submission for your required post-travel disclosure.

Name of Traveler:	Rebecca Shipp, Health and Human Resources Policy Advisor
Employing Office/Committee: _	Senate Finance Committee
Private Sponsor(s) (list all): The	Aspen Institute
Travel date(s): August 28 - 29  Note: If you plan to exten	nd the trip for any reason you <u>must</u> notify the Committee.
Destination(s): Cleveland, OF	<del></del>
Explain how this trip is specifica	lly connected to the traveler's official or representational duties:
	poverty issues for the Senate Finance Committee. The purpose of this economic mobility has changed over time and to explore issues related to
Name of accompanying family relationship to Employee:	
I certify that the information con	tained in this form is true, complete and correct to the best of my knowledge:
7/25/17 (Date)	(Signature of Employee)
Secretary for the Majority, Secretary	VISING SENATOR/OFFICER (President of the Senate, Secretary of the Senate, Sergeant at Arms, y for the Minority, and Chaplain):
I, Senator's/Officer	Hatch hereby authorize Rebecca: Shipp (Print Traveler's Name)
related expenses for travel to the duties as a Senate employee or a private gain.	ervision, to accept payment or reimbursement for necessary transportation, lodging, and event described above. I have determined that this travel is in connection with his or her n officeholder, and will not create the appearance that he or she is using public office for the employee's spouse or child is appropriate to assist in the representation
of the Senate. (signify "yes" by ch	

(Signature of Supervising Senator/Officer)

### PRIVATE SPONSOR TRAVEL CERTIFICATION FORM

This form must be completed by any private entity offering to provide travel or reimbursement for travel to Senate Members, officers, or employees (Senate Rule 35, clause 2). Each sponsor of a fact-finding trip must sign the completed form. The trip sponsor(s) must provide a copy of the completed form to each invited Senate traveler, who will then forward it to the Ethics Committee with any other required materials. The trip sponsor(s) should NOT submit the form directly to the Ethics Committee. Please consult the accompanying instructions for more detailed definitions and other key information.

The Senate Member, officer, or employee MUST also provide a copy of this form, along with the appropriate travel authorization and reimbursement form, to the Office of Public Records (OPR), Room 232 of the Hart Building, within thirty (30) days after the travel is completed.

_	onsor(s) of the trip (please list all sponsors):e Aspen Institute (Education & Society Program - E&S Program) (see continued response)
Des	scription of the trip: Aspen Institute-sponsored convening for senior Congressional staffers
	ponsible for various programs and policies that affect mobility from poverty.
Dat	es of travel: August 28-29, 2017
	ce of travel: Cleveland, OH
Nai	ne and title of Senate invitees: Please see attached roster
	rtify that the trip fits one of the following categories:
X	(A) The sponsor(s) are not registered lobbyists or agents of a foreign principal <u>and</u> do not retain or employ registered lobbyists or agents of a foreign principal <u>and</u> no lobbyist or agents of a foreign principal will accompany the Member, officer, or employee at any point throughout the trip.
Ţ	(B) The sponsor or sponsors are not registered lobbyists or agents of a foreign principal, but retain or employ one or more registered lobbyists or agents of a foreign principal and the trip meets the requirements of Senate Rule 35.2(a)(2)(A)(i) or (ii) (see question 9).
X	I certify that the trip will not be financed in any part by a registered lobbyist or agent of a foreign principal.
X	I certify that the sponsor or sponsors will not accept funds or in-kind contributions earmarked directly or indirectly for the purpose of financing this specific trip from a registered lobbyist or agent of a foreign principal or from a private entity that retains or employs one or more registered lobbyists or agents of a foreign principal.
I ce	rtify that:
X	The trip will not in any part be planned, organized, requested, or arranged by a registered lobbyist or agent of a foreign principal except for de minimis lobbyist involvement.
X	The traveler will not be accompanied on the trip by a registered lobbyist or agent of a foreign principal except as provided for by Committee regulations relating to lobbyist accompaniment (see question 9).

9.	USE ONLY IF YOU CHECKED QUESTION 6(B).  I certify that if the sponsor or sponsors retain or employ one or more registered lobbyists or agents of a				
	foreign principal, one of the following scenarios applies:  (A) The trip is for attendance or participation in a one-day event (exclusive of travel time and one overnight stay) and no registered lobbyists or agents of a foreign principal will accompany the Member officer, or employee on any segment of the trip.				
	(B) The trip is for attendance or participation in a one-day event (exclusive of travel time and two overnight stays) and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee on any segment of the trip (see questions 6 and 10).				
	(C) The trip is being sponsored only by an organization or organizations designated under § 501(c)(3) of the Internal Revenue Code of 1986 and no registered lobbyists or agents of a foreign principal will accompany the Member, officer, or employee at any point throughout the trip.				
10.	USE ONLY IF YOU CHECKED QUESTION 9(B) If the trip includes two overnight stays, please explain why the second night is practically required for Senate invitees to participate in the travel:				
11.	An itinerary for the trip is attached to this form. I certify that the attached itinerary is a detailed (hourby-hour), complete, and final itinerary for the trip.				
12.	Briefly describe the role of each sponsor in organizing and conducting the trip:				
	The Aspen Institute Education & Society Program facilitates the Aspen Senior Congressional Education				
	Staff Network and organizes convenings to support staffers' professional learning. The Aspen Education				
	& Society Program staff are completely and solely responsible for the retreat's planning and organization.				
13.	Briefly describe the stated mission of each sponsor and how the purpose of the trip relates to that mission:  The Aspen Institute is an educational and policy studies non-profit organization whose mission is to foster				
	leadership based on enduring values and provide a non-partisan forum for the exchange of ideas. The				
	E&S Program seeks to provide a neutral forum that encourages off-the-record, (see continued response)				
14.	Briefly describe each sponsor's prior history of sponsoring congressional trips:				
	The Aspen Institute has a nearly forty year history of conducting non-partisan educational forums, which				
	often include Members of Congress and staff. The E&S Program has been conducting convenings for				
	Congressional education staff for eleven years.				

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	trips): The Asnen Institute holds numerous educational activities, including educational briefings, roundtables.					
•	The Aspen Institute holds numerous educational activities, including educational briefings, roundtables, forums, and conferences. The E&S Program works with federal, state and local education leaders to					
	improve K-12 student a	achievement, particula	rly for traditionally un	derserved students	•	
•	Total Expenses for Eacl	h Participant:				
ı		Transportation	Lodging Expenses	Meal	Other Expenses	
		\$500.00.	\$134.00	\$103.50	\$173.14	
	Good Faith estimate				(mtg room a incidentals	
	☐ Actual				.	
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1	State whether a) the trip participation or b) the trongressional participat	rip involves an event t				
1	participation or b) the t	rip involves an event t	hat is arranged or org	ganized specifically	with regard to	
1	participation or b) the trongressional participat	rip involves an event to ion:  ard to Congressional s	hat is arranged or org	der to support their	with regard to	
-	participation or b) the trongressional participates) b) Specifically with regard	rip involves an event to ion:  bility and new evidence	taff participation in or	der to support their	with regard to	
] -	participation or b) the the congressional participated by Specifically with regardeness in economic molecular molecular conditions.	rip involves an event to ion:  bility and new evidence location of the event	taff participation in or e on programs design	der to support their ned to increase mot	with regard to learning on rece	
]	participation or b) the treestonal participates b) Specifically with regardeness in economic molecular the Reason for selecting the	rip involves an event to ion:  and to Congressional solility and new evidence location of the event will allow participants to	taff participation in or e on programs design or trip observe first-hand s	der to support their ned to increase moto	learning on rece	
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]	participation or b) the trends in economic molecular the Meeting in Cleveland with remaining the mobility from poverty and	rip involves an event to ion:  and to Congressional solity and new evidence location of the event will allow participants to and to hear directly from otel or other lodging for the solity and to hear directly from the solity and the solity from the solit	taff participation in or e on programs design or trip o observe first-hand s n state and local office	der to support their ned to increase moto of the challenge ials. (see continued	learning on rece	
]	participation or b) the trends in economic molecular trends in economic molecular the Meeting in Cleveland with mobility from poverty at Name and location of here.	rip involves an event to tion:  and to Congressional solity and new evidence location of the event will allow participants to and to hear directly from total or other lodging from town, 100 Lakeside Avent	taff participation in or e on programs design or trip observe first-hand s n state and local offic acility: venue East, Clevelan	der to support their ned to increase moto of the challenge ials. (see continued	learning on receivily from poverty	

l.	Describe how the daily expenses for lodging, meals, and other expenses provided to trip participants compares to the maximum per diem rates for official Federal Government travel:				
	Rooms are \$134/day, which reflects the per diem limit.				
	Meals are \$69.00/day or \$51.75 first/last day of travel which reflects the per diem limit.				
2.	Describe the type and class of transportation being provided. Indicate whether coach, business-class or first class transportation will be provided. If first-class fare is being provided, please explain why first-class travel is necessary:				
	Coach airfare is provided.				
3.	I represent that the travel expenses that will be paid for or reimbursed to Senate invitees do not include expenditures for recreational activities, alcohol, or entertainment (other than entertainment provided to all attendees as an integral part of the event, as permissible under Senate Rule 35).				
4.	List any entertainment that will be provided to, paid for, or reimbursed to Senate invitees and explain why the entertainment is an integral part of the event:				
	none provided				
5.	I hereby certify that the information contained herein is true, complete and correct. (You must include the completed signature block below for each travel sponsor.):  Signature of Travel Sponsor: Miffyy				
	Name and Title: Elliot Gerson, Executive Vice President, Policy & Public Programs				
	Name of Organization: The Aspen Institute				
	Address: 1 Dupont Circle NW, Suite 700, Washington, DC. 20036				
	Telephone Number: 202-736-5859				
	Fax Number: 202-467-0790				
	E-mail Address: lisa.jones@aspeninst.org				

### **Instructions**

(Do not file the Instructions with OPR)

### **General Instructions**

- The Senate Select Committee on Ethics ("Ethics Committee") has developed guidelines for evaluating privately-sponsored trips and for judging whether trip expenses are reasonable. Trip sponsors should consult the Senate Select Committee on Ethics' Regulations and Guidelines for Privately-Sponsored Travel, including the Glossary of Terms, prior to filling out the Private Sponsor Travel Certification Form and contact the Ethics Committee at (202) 224-2981 with any additional questions. The Ethics Committee will make the final determination as to whether the expenses incurred during a privately-sponsored trip are reasonable.
- If there are multiple sponsors, they should jointly complete one Private Sponsor Travel Certification Form for the trip. Each travel sponsor should complete the signature block.
- When evaluating a trip proposal and judging the reasonableness of expenses, the Ethics Committee will consider the following factors:
  - a. the stated mission of the organization sponsoring the trip;
  - b. the organization's prior history of sponsoring congressional trips, if any;
  - c. other educational activities performed by the organization besides sponsoring congressional trips;
  - d. whether any trips previously sponsored by the organization led to an investigation by the Select Committee on Ethics;
  - e. whether the length of the trip and the itinerary is consistent with the official purpose of the trip;
  - f. whether there is an adequate connection between a trip and official duties;
  - g. the reasonableness of the total amount spent by a sponsor of the trip;
  - h. whether there is a direct and immediate relationship between a source of funding and an event;
  - i. the maximum per diem rates for official Federal Government travel published annually by the General Services Administration, the Department of State, and the Department of Defense;
  - j. whether travel to a location or event is arranged or organized without regard to congressional participation, or whether it is specifically organized for Congressional staff; and
  - k. any other factor deemed relevant by the Select Committee on Ethics.

Consult the Senate Select Committee on Ethics' Regulations and Guidelines for Privately-Sponsored Travel, including the Glossary of Terms, for further discussion of these factors.

- Responses to each question should be brief, consistent with the requirement to provide all relevant information. Attach additional pages, as necessary.
- To allow sufficient time for the Ethics Committee to review requests for privately sponsored travel, the participating Senate Members, officers, and employees must submit the completed form to the Ethics Committee at least thirty (30) days before the date of the proposed trip.

## Aspen Retreat for Senior Congressional Staff Network on Mobility from Poverty

### Mobility from Poverty: Recent Trends and Potential Responses

Hilton Cleveland Downtown 100 Lakeside Ave E Cleveland, OH 44114 P: 216-413-5000

August 28-29, 2017

### AGENDA

### **Retreat Goals:**

8:00 - 11:00 AM

Understand how economic mobility has changed over time and learn how neighborhood characteristics can influence economic mobility and intergenerational poverty.

Understand recent evidence on the effectiveness of interventions designed to increase mobility from poverty, including interventions that address the role of family, the role of place, and the changing structure of labor markets.

Engage in active learning and build working relationships with scholars and practitioners in the field, with state and local officials, and with colleagues from different parties and chambers.

Explore potential roles for Congress and Executive Branch agencies in increasing mobility from poverty.

### Monday, August 28, 2017

	1.
11:30 - 12:00 PM	Welcome, Overview, and Retreat Objectives
12:00 – 1:00 PM	Lunch with Keynote Address on Economic Mobility
	This address will review the most recent evidence on changes over time in absolute and relative income mobility, the effect of neighborhood characteristics on mobility from poverty, and potential policy responses to these trends.
1:00 - 1:15 PM	Break
1:15 – 5:30 PM	Site Visit with Cleveland Service Providers
	Visit with Cleveland Public Schools and partner service providers to learn how schools are being used as a platform to provide more comprehensive services to help families increase mobility from poverty. Talk with residents about the challenges they face in achieving economic stability and helping their children succeed, and their experience engaging with service providers.
5:30 - 6:30 PM	Break
6:30 - 7:00 PM	Networking Reception with Expert Faculty
	Staffers will have the opportunity to network with participants during the reception.

Participants arrive and check in

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5:00 - 7:00 PM

### Dinner with Discussion of Earlier Sessions

## Tuesday, August 29, 2017

7:30 – 8:30 PM	Breakfast
8:30 – 9:15 AM	Reflection on site visit
	Reflection on meetings with Cleveland residents and service providers. Discuss the extent to which challenges in Cleveland resemble challenges elsewhere in the country. Identify top two learning objectives for each participant.
9:15 – 10:30 AM	The Role of Family
	Learn about the effect of family formation on mobility from poverty and about programs designed to more effectively integrate supports for both children and parents.
10:30 – 10:45 AM	Break
10:45 – 12:00 PM	Responding to Changing Labor Markets
	Learn how changes in the labor market increase the challenge of mobility from poverty and consider potential policy responses, including better aligning education and sectorspecific job training, wage subsidies, and other responses.
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12.15 – 1.30 PM	Lunch with Discussion of Place-Conscious Strategies
	Discuss the challenge of implementing collective impact models: how can successful, narrowly-focused programs be brought together into comprehensive strategies to address mobility on a neighborhood and regional-wide scale? What are the benefits and challenges of building mixed-income neighborhoods? How can regions build complementary strategies to improve existing neighborhoods while increasing geographic mobility for those who wish to move.
1:30 - 2:45 PM	Perspectives from State and Local officials
	Learn how city/county/state officials are thinking about issues related to mobility from poverty and how they view related federal policies.
2:45 - 3:00 PM	Break
3:00 - 3:15 PM	Complete program evaluation
3:15 - 3:45 PM	Final Observations from Expert Faculty
3:45 – 4:15 PM	Taking Stock: Staff Reflections and Feedback to Guide Next Steps for the Network
4:15 PM	Adjourn

Participants depart for airport

### Aspen Congressional Network

## CONGRESSIONAL STAFF



 $\mathcal{A}_{\mathrm{tab}}(\mathcal{A}) =$ 

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### Heideh Shahmoradi

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Suite 700

Washington, DC 20036-1133

PH 202-736-5800

FX 202-467-0790

www.aspeninstitute.org

July 14, 2017

Dear Senate Colleague,

We are writing to invite you to participate in an upcoming retreat – "Mobility from Poverty: Recent Trends and Potential Responses" – for the Aspen Senior Congressional Staff Network on Mobility from Poverty beginning 11:30 AM Monday, August 28, 2017 through 4:15 PM Tuesday, August 29, 2017 at the Hilton Cleveland Downtown in Cleveland, Ohio.

At this convening, staffers will hear from researchers and practitioners how economic mobility has changed over time, and how neighborhood characteristics can influence economic mobility and intergenerational poverty. Staffers will learn about recent evidence on the effectiveness of interventions designed to increase mobility from poverty, including interventions that address the role of family, the role of place, and the changing structure of labor markets. The convening also will focus on potential roles for Congress and the executive branch in increasing mobility from poverty. Finally, the retreat will provide an opportunity for staffers to engage in their own learning and build working relationships with colleagues from different parties and chambers and with leading experts in the field.

We fully comply with the rules that have been enacted by the House regarding privately-funded travel. Enclosed you will find all the forms necessary for Ethics rules compliance:

- A detailed agenda listing discussion sessions
- A completed Private Sponsor Travel Certification Form with Appendix and attached list of invited Senate staffers
- A list of invited Senate and House staffers
- A blank Employee Pre-Travel Authorization Form

You must complete the Traveler Form and submit it with the enclosed agenda, list of invited staffers, Primary Trip Sponsor Form, and Grantmaking Trip Sponsor Form directly to the Committee on Ethics (1015 Longworth) no later than Friday, July 28, 2017. After receiving the completed travel package, the Ethics Committee will review and issue an approval to you or your sponsoring Member. After the trip, you will need to complete a post-travel form that we will email to you after the site visit.

Attendance is by invitation only, with no outside observers or lobbyists. Funding is provided solely by grants from established foundations – no government, individual, foreign, corporate, or special interest money is accepted. The Network is supported by The Bill & Melinda Gates Foundation. The Aspen Education & Society Program maintains autonomy over invitations, materials, and the agenda for the retreat.

The retreat will begin at 11:30 AM on Monday, August 28, 2017, at the Cleveland Downtown Hilton and will conclude at 4:15 PM on Tuesday, August 29, 2017. Please plan your travel accordingly in order to be present for the duration of the retreat. Dress is casual for all meetings.

The retreat promises to be productive and informative. We look forward to seeing you there.

Warm regards,

Ross Wiener